

## **Main Menu MODULE**

September 15, 1999

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## **SWSS Project**

## **USER REQUIREMENTS**

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# **1 INTRODUCTION**

## **1.1 Purpose**

The SWSS system has been developed in order to meet the mandates for AFCARS and create Michigan's SACWIS.

The Main Menu contains icons for all the functional sections of SWSS. Each section represents a unique work process in Foster Care, Adoption or Juvenile Justice casework. The icons are tied together by patterns of flow of data applied to registering, opening, maintaining or closing a case. All sections are connected together through the Main Menu.

## **1.2 Target Audience**

This document is intended for SWSS development staff, who will be developing a Detail Design document to address the requirements listed in this document. It will also be of interest to development staff charged with maintaining the SWSS automated system.

The following personnel may also be interested:

- SWSS Trainers
- FIA Help desk personnel
- SWSS advance users
- Zone Children's services specialists
- Policy Office

## **2 MODULE NARRATIVE**

SWSS is composed of multiple sections, which are identified by both icons and the case identification box on the Main Menu screen. The Main Menu is the central access and exit point for SWSS modules.

FIA staff who are involved are Children's Services workers and supervisors.

There are no output documents generated from the Main Menu.

## 3 NAVIGATION FLOW

### 3.1 Screen Interaction

Most selections from the Main Menu require the user to have a case identified before the user can access the icon. If the user has not selected a case, a message should appear allowing the choice of either going to the case listing or canceling the selection of this icon.

Depending on the status of the case, some data entry modules may not be available. In this situation, a message will appear to this effect.

The icons that do not require prior selection of a case are Case Listing, Management Reports and Provider, Ticklers, and View Profile under the Utilities Menu.

The Main Menu has a Case ID Box located on the panel at the top right of the Screen. If a case has not been selected from the case listing, this is where the user begins case activity. It contains:

- Log # Field. If the user knows the log number of the desired case, it can be entered here instead of selected from the case listing.
- Case # Field. This field displays the case number of the identified case for a case that already has a case number assigned to it. The Case Number cannot display on a case until it has been determined and entered in the Case Registration or child data section. It is not available for user input.
- Case Listing. Select this command button to view a list of all cases assigned to user's caseload.
- Find a Client. Select this button to begin a search using Soundex.
- Add New. Select to add a new case to user's caseload. This includes a Soundex search to determine whether the client is already in SWSS.

The Log # and Case # fields have a feature that displays the case name when the cursor is pointed to the # after a log # and case # has been displayed.

The Corrections mode can only be activated or deactivated from the Main Menu. Corrections mode requires that the case is open and the user has update privileges. If the case is closed, only supervisors have access to corrections mode.

### 3.2 System Flow

The only data that can be entered on the Main Menu is log #. The log number identifies the case the user is choosing. Icons or command buttons selected determine what module or function will next be accessed.

## 4 REQUIREMENTS LIST

The comprehensive (we hope) list of requirements derived from the original requirements, ensuing memos, emails, and test plan documentation.

### 4.1 Screen, Data, Out-of-Module, Output, Module and Miscellaneous Requirements

The following requirements were derived from the original requirements documents written by policy staff for the SWSS project. Any ensuing memos, emails, or test plans regarding the project were also searched. It is intended to be a comprehensive list of all requirements pertaining to the Main Menu module. Each individual requirement has a unique identifier; the two letter prefix identifies this particular module (MM = main menu).

The list is to be used in a Requirements Traceability Matrix, which will be comprised of all the requirements for all the SWSS modules, so that the status of each requirement can be tracked and verified.

Late 2008: New Requirement. Provide the ability to Financial Specialists to access the Main Menu screen.

#### **MM-1 SCREEN REQUIREMENTS:**

- MM-1.1 There must be a “Main Menu” screen. This screen will serve as a central point from which almost all SWSS modules can be accessed.
- MM-1.1.1 There must be multiple mechanisms for a SWSS user to select a case before accessing a module. (details follow)
  - MM-1.1.1.1 If the log number of an existing case is known, the user must be able to enter this log number into a “Log #” field.
  - MM-1.1.1.2 The user must be able to go into the Soundex (or “Find A Client”) module to search for a pre-existing case when the log number is not known.
  - MM-1.1.1.3 If the user does not know the log number of the case he/she wishes to work on, the user must be able to go into the “Case Listing” module to search for a case that is currently assigned to the user.
  - MM-1.1.1.4 The user must be able to add a brand new case to the SWSS system by using the “Add New” function.
  - MM-1.1.1.4.1 Using this option will send the user to the Soundex (or “Add New”) module<sup>1</sup>. The Soundex (“Add New”) module will help determine if the case already exists or if the child previously had a case and allows the user to prefill the new case with previously entered data, thereby establishing the continuum of care<sup>2</sup>.

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<sup>1</sup> Because of the enormous volume of cases across the State Of Michigan, the user may be trying to add a case to the system that already exists.

<sup>2</sup> Continuum of care is the succession of services cases for a child.

- MM-1.1.1.5 The user must not be allowed to select a case by entering a case number. Case numbers are CIS case numbers. These numbers are NOT guaranteed to be unique from case to case. CIS case numbers can also be re-used. Since a unique identifier is required in order to select a case, case number cannot be used.
- MM-1.1.1.6 Once the case information has been collected, the case name shall be displayed in a “tool tip” whenever the mouse hovers over the “Log #” or “Case #” fields.
- MM-1.1.2 There must be at least one mechanism for selecting a SWSS module.
- MM-1.1.2.1 The following list of modules must be accessible from the “Main Menu” module via icons or menu selections:
  - MM-1.1.2.1.1 Case Listing
  - MM-1.1.2.1.2 Soundex (or “Find A Client”)
  - MM-1.1.2.1.3 Soundex Add New search
  - MM-1.1.2.1.4 Case Registration
  - MM-1.1.2.1.5 Child Information
  - MM-1.1.2.1.6 Member Information
  - MM-1.1.2.1.7 Legal
  - MM-1.1.2.1.8 Funding Determination
  - MM-1.1.2.1.9 Placement
  - MM-1.1.2.1.10 Payment
  - MM-1.1.2.1.11 Education
  - MM-1.1.2.1.12 Medicaid
  - MM-1.1.2.1.13 Medical Passport (disabled)
  - ~~MM-1.1.2.1.14 Five Day Packet/Placement Outline~~ CIMS Transaction (*changed as of 09/30/2003 for SDM*)
  - MM-1.1.2.1.15 Comments (*moved to the SDM Case Management Module*)
  - MM-1.1.2.1.16 Case Summary
  - MM-1.1.2.1.17 MARE Registration
  - MM-1.1.2.1.18 Case Closing
  - MM-1.1.2.1.19 Provider (*moved to the Utilities Menu*)

- ~~MM-1.1.2.1.20~~ ~~Report Generation~~ Management Reports (*changed as of 09/30/2003 for SDM*)
- MM-1.1.2.1.21 Utility Menu
- MM-1.1.2.1.22 ~~Ticklers~~ Case Reports (*changed as of 09/30/2003 for SDM*)
- MM-1.1.2.1.23 SDM Case Management Menu (*added 09/30/2003 for SDM*)
- MM-1.1.2.2 The three possible methods of selecting a module are: (details follow)
- MM-1.1.2.2.1 The user may select an icon graphic.
- MM-1.1.2.2.2 The user may select a module from the Section menu of the Common Menu Bar.
- MM-1.1.2.2.3 The user may use a Ctrl+<key> key combination. To use the “Funding Determination” as an example, the user can press the Ctrl+f keys at the same time.
- MM-1.1.2.2.4 The “Main Menu” module must determine if the user has permission to access a module for the selected log number and what kind of access will be granted based upon several factors. (details follow)
- MM-1.1.2.2.4.1 The Case Listing, Soundex (including “Find a Client” and “Add New”), Management Reports, and Utilities (for Ticklers, Provider, Manage Related Cases and View Profile) modules do not require the selection of a log number.
- MM-1.1.2.2.4.1.1 NOTE: The “CPS Transfer Information”<sup>3</sup> module is accessible through the Utility Menu module and **does** require a case. Therefore, if the user wishes to successfully get to “CPS Transfer Information” through the Utility Menu module, they need to specify a case from “Main Menu” or “Case Listing” first.
- MM-1.1.2.2.4.2 If the user has not chosen a log number (or has chosen a log number that is currently not used in the SWSS system), a warning message must be displayed and the user must be given the opportunity to go to the “Case Listing” module in order to select a valid log number.
- MM-1.1.2.2.4.3 The user’s relationship to the selected case. This covers the primary worker assigned to the case, the alternate worker assigned to the load number of the primary worker of the case, the supervisor of the primary worker of the case, *et cetera*.<sup>4</sup>
- MM-1.1.2.2.4.4 The present case status.
- MM-1.1.2.2.4.5 The set of programs the user has access to (Foster Care, Adoption, Juvenile Justice, Provider Management, Adoption Subsidy).

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<sup>3</sup> The CPS Transfer Information, a.k.a. Reconciliation, a.k.a. “JTL”, is only used during SWSS implementation when open cases are converted from CIS.

<sup>4</sup> This can also be called the user’s responsibility for the selected case.



- MM-1.1.2.2.4.5.1      The Financial specialists will be given access to Original SWSS FAJ and not ASCAP and Adoption Subsidy.
- MM-1.1.2.2.4.6      The program that the selected case is assigned to (Foster Care, Adoption, Juvenile Justice).
- MM-1.1.2.2.4.6.1      The Financial Specialists will be given access and update rights to Foster care, Juvenile Justice cases, and Adoption cases for the county or counties they are responsible for.
- MM-1.1.2.2.4.7      The user's security level in relation to the case.
- MM-1.1.2.2.4.7.1      The Financial Specialists will be able to view Foster care, Adoption, Juvenile Justice case, and also be able to update Foster Care, Adoption, and Juvenile Justice case.
- MM-1.1.2.2.4.8      Additional information is also used to determine if the user is to be allowed access to the selected module. These requirements, however, are covered in the "Security User Requirements.doc" and "Common User Requirements.doc" document.
- MM-1.1.2.2.5      The types of access available to a user for a module are: (details follow)
- MM-1.1.2.2.5.1      Updateable. This means the user is granted full access to almost all data for the selected case. Reading and changing data are permitted for most data fields.
- MM-1.1.2.2.5.2      Selectively Updateable. This means the user has access to the case data. However, the user may have restrictions placed upon him/her that are specific to the selected module and the selected case. This type of access is typically given to users who are Secondary Workers of the selected case. See the "User Requirements.doc" document for the selected module for more information.
- MM-1.1.2.2.5.3      Not Updateable. This means that the user may view the data for the selected case that is provided by the selected module. However, the user should be prevented from changing any of that data. This type of access is typically given to users who want to view a case from another county when they have no direct "relationship" to it (they are not the Primary Worker, Secondary Worker, or Supervisor). Again, the selected module has the permission to use this access type however it needs to do so. For more information, see the "User Requirements.doc" document for the selected module.
- MM-1.1.3      There must be a mechanism for activating/deactivating Autoflow<sup>5</sup>.
- MM-1.1.4      There must be a mechanism for activating/deactivating "Corrections Mode".

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<sup>5</sup> The "Common User Requirements.doc" document contains the details of how Autoflow operates in the SWSS application.

- MM-1.1.4.1 The “Main Menu” module is the only module in which a user may activate/deactivate Corrections mode. This is covered in more detail in the “Common User Requirements.doc” document.
- MM-1.1.4.2 See the **MODULE REQUIREMENTS** subsection for more requirements on “Corrections Mode” as handled by the “Main Menu” module.
- MM-1.1.5 There must be at least one mechanism, which will allow a user to leave their current SWSS “session”.
- MM-1.1.5.1 The user can select an “Exit” graphic icon.

**MM-2 DATA EDITING REQUIREMENTS:**

- MM-2.1 The Log Number entered into the “Log #” field must be all numbers. Alpha characters for a log number are not accepted.
- MM-2.2 The “Case #” field must be a read-only field.

**MM-3 OUT-OF-MODULE REQUIREMENTS:**

MM-3.1 SOUNDEX REQUIREMENTS:

- MM-3.1.1 When the user returns to the “Main Menu” module from the Soundex (or “Find A Client”) module, the “Log #” field may be pre-filled if the user did indeed select a case. If there is a case number associated with the case, a “Case #” field may also be pre-filled.

MM-3.2 CASE LISTING REQUIREMENTS:

- MM-3.2.1 When the user returns to the “Main Menu” from the “Case Listing” module, the “Log #” field will be pre-filled if the user did indeed select a case. If there is a case number associated with the case, a “Case #” field will be pre-filled.

MM-3.3 SWSS LOGIN AND TICKLERS REQUIREMENTS:

- MM-3.3.1 No user is to be allowed into the “Main Menu” module unless they have successfully logged into the system through the “SWSS Login” module. Upon a successful login, the Tickler module is executed, followed by “Main Menu”.

- MM-3.4 Delete this later

MM-3.5 CASE REGISTRATION REQUIREMENTS:

- MM-3.5.1 For Registered Cases, the user should be allowed to enter any information that they have on SWSS at any time before the Case is Open (by completing the CIS Transaction).
- MM-3.5.1.1 Addendum: This should only be true as long as they have permission to update the data for the selected case.
- MM-3.5.2 A worker's supervisor requires access to the worker's caseload.

**MM-4            MODULE REQUIREMENTS:**

- MM-4.1            The “Main Menu” module should only have to gather case information from the Oracle database if: (details follow)
- MM-4.1.1          Main Menu is activated from the “Case Listing”, Soundex (“Find A Client”) or “Case Registration” modules.
- MM-4.1.2          The log number has been changed in the “Log #” field (except if that field has been cleared) and the user has not requested the activation of the “Case Listing” or Soundex (“Find a Client” or “Add New”) modules.
- MM-4.2            The “Main Menu” module will determine the current user’s update access to the selected case for the selected module in the following manner: (Details follow)
- MM-4.2.1                If the User is a Financial Specialist, they can view everything in the SWSS FAJ, and that includes Original SWSS FAJ, CPS, and CMS.
- MM-4.2.2                If the User is a Financial Specialist, they can view any non –high Profile Foster care, Adoption, and Juvenile justice case.
- MM-4.2.3                If the user is a worker or in the supervisory chain of command, they may update any open case<sup>6</sup> assigned to them.
- MM-4.2.4                If the user is a worker or a supervisor with access to foster care, adoption, adoption subsidy, or juvenile justice they may view any non-High Profile<sup>7</sup> Foster Care, Adoption or Juvenile Justice case.
- MM-4.2.5                If the user is a worker or a supervisor with access to Adoption they may view any non-High Profile Adoption case assigned to them.
- MM-4.2.6                If the user is a worker or supervisor they may restrictively update<sup>8</sup> open cases that are assigned to them as secondary workers.
- MM-4.2.7                If the user is a supervisor, they may update a closed Foster Care, Adoption or Juvenile Justice case assigned to them in corrections mode.
- MM-4.2.8                High Profile cases may only be viewed or updated by the assigned worker or that worker’s direct supervisory chain of command. ~~All other users are restricted to only the “Case Summary” module in order to view the case information.~~ Information contained in the Case Summary module is the only case specific information any other user may view.
- MM-4.2.9                Users assigned to the central office county have view access to any open or closed case in a program for which they have access.

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<sup>6</sup> Open cases are those that are Unregistered, Registered, or Active, or any of the variants of those three case states.

<sup>7</sup> High Profile cases are flagged as such in the Case Listing module, and are cases involving State Of Michigan employees or celebrities of some kind or those having some medical condition that is nobody else’s business.

<sup>8</sup> The individual module will determine what data elements are restricted and what are available to the secondary worker.

- MM-4.2.10 If the user is a unit clerk, they may update or view all cases (except “high profile” cases) in their unit<sup>9</sup> that are assigned to any program(s) to which the user’s profile has been granted access. ~~These users may view the Case Summary on the “high profile” cases.~~ Information contained in the Case Summary module is the only case specific information these users may view on “high profile” cases.
- MM-4.3 The “Main Menu” module will determine a user’s access to “Corrections Mode” after a valid SWSS case has been selected. Once the user’s update access has been determined (See MM-4.2 to start), the following requirements determine if the user is allowed to activate/inactivate “Corrections Mode”: (details follow)
- MM-4.3.1 Specialists will be allowed to do corrections on Active cases and not the closed foster care, Adoption, and juvenile justice cases.
- MM-4.3.2 If the user is a supervisor they may use corrections mode on any active or closed Foster Care, Adoption or Juvenile Justice case assigned to them or assigned to anyone under their supervision.
- MM-4.3.3 If the user is a worker they may use corrections mode on any active case assigned to them as the primary worker.
- MM-4.3.3.1 If the user is a secondary worker, s/he can restrictively<sup>8</sup> use corrections mode on any active case assigned to them as a secondary worker.
- MM-4.3.3.2 The primary worker and his/her supervision is to be permitted to correct a funding determination on a registered case.
- MM-4.3.4 If the user is a unit clerk they may use correction mode on any active case assigned to their unit for which the user has access to that program.
- MM-4.3.5 If the user may not use corrections mode then a message must be displayed to inform the user of this.
- MM-4.4 If the user is editing a case in corrections mode and changes the log number to edit a different case, corrections mode must be automatically turned off.
- MM-4.5 If the user performs an action upon the database after the database has timed the user out, SWSS must automatically reconnect to the database and continue working.
- MM-4.6 Central Office users (county 84) need inquiry access for case information.

## **MM-5 OUTPUT REQUIREMENTS:**

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<sup>9</sup> “All cases in their unit” refers to all cases that have primary load numbers assigned to them that have the same county, district, section, and unit combination found in the clerical user’s load number.

<sup>8</sup> The individual module will determine what data elements are restricted and what are available to the secondary worker.

MM-5.1        The Main Menu module does not generate any printed output.

**MM-6        MISCELLANEOUS REQUIREMENTS:**

MM-6.1        Misc. Req 1, such as certain data has to go to data warehouse

## **5 EXAMPLE OUTPUT**

Gather and include the forms and letters generated by this module. If possible, mark up the examples to explain the data fields to show the source or whether or not it is required.

## 6 DATA ELEMENT DESCRIPTIONS

A table of all the data elements entered within this module. For each item, describe its range of acceptable values. Designate items as being required for ASSIST, CIS, LICENSING or AFCARS (and any combination thereof).

<b>ELEMENT NAME</b>	<b>DESCRIPTION</b>	<b>TYPE - Alpha, numeric, A/N</b>	<b>SIZE</b>	<b>REQUIRED/ OPTIONAL/ CONDITIONAL</b>	<b>CIS/ASSIST AFCARS/ LICENSING out put doc.</b>
Log number	unique system generated number to identify a specific case	N	21	Optional	Not applicable

## 7 HELP MESSAGES

There are to be three levels of help available: Screen, which describes how the process for the current module is supposed to work, Context-Sensitive, which describes a particular data field on the screen, and Status Panel, which offer hints about the field or command button with the current focus.

7.1 SCREEN (Section or Module level. Offers an entry point to the big help file.)

7.2 CONTEXT-SENSITIVE (“F1”, aka “detail”)

7.3 STATUS PANEL MESSAGES (formerly known as “Field Level” and “Baby” before that.)

### Module: Main Menu

Field	New Message
log #	Enter log number, if known
Case #	Enter case number, if known
Case Listing	Select to go to Case Listing screen
Find a client	Select to go to Find a client screen
Add New	Select to add a new case



## **8 MODULE DEPENDENCIES**

What data must be entered in other modules before this module can be used?

What changes in data within other modules affect this module?

The Main Menu displays the module icons for user friendly access. The Main Menu is interdependent with all modules.

## **9 SCENARIOS**

The requirements scenarios that call for data entered by this module. This is just a cross reference into the

The updated test plans written by the Program Office and/or the developer to verify the correctness of the finished application.

## 10 SOURCE MATERIAL

The following items are included for historical purposes only. The current requirements were derived from this source material, and are, in places, out of date, incorrect, or conflicting.

### 10.1 Original Requirement

#### PROCESS DESCRIPTION

Creation Date: 04/13/98 1:36 PM  
Last Print Date: 3/9/2010 5:15:00 PM  
Last Save Date: 1/12/2009 10:47:00 AM  
Author: Matthew D. Miller

Process: Main Menu

This process gathers case information to be stored into the SWSS\_INI.INI file before any other process is executed. It is the common point from which most processes are started most of the time. Several security checks, based upon who is supposedly logged onto the system, are made to determine if the user has access rights to a case process, if any. These security checks are not all inclusive, however they offer a vast starting point. This process also activates/deactivates corrections mode for certain users.

Unit Dependencies

**(Describe the data or other programs upon which this development unit depends; i.e., certain data tables or fields, data processed in a certain way, or certain functionality that must be accomplished before this program is valid.)**

No user is to be allowed into this program unless they have successfully logged into the system through the Login process. Upon a successful login, the Tickler process is executed, followed by the Main Menu.

One of the main functions of this process is to “shell out” to all other processes from a central menu location. All process executable files are expected to reside in the same hard drive folder as the Main Menu process executable. If the requested executable does not exist, a message box is displayed to the user, warning of the failure to find the required file.

This process will shut down after successfully “shelling out” to another process. When the Soundex process is “shelled out”, the Main Menu process shuts down. When Soundex is completed, it will “shell out” back to the Main Menu process. The Main Menu will then check to see if a [Soundex] section appears in the SWSS\_INI.ini file. If it does exist, then the value of the Log\_ID entry of that section is stored into the Log Number field on the screen. The Case Number field is also cleared. Very similar functionality is also followed with the Case Listing process.

The Main Menu process reads and writes many values to and from the SWSS\_INI.ini file. This file is expected to be located in the same hard drive folder as the Main Menu executable file.

The following information should be available in the SWSS\_INI.ini file by the time the Main Menu process is launched:

- 1) login user's; User Name, Password, worker ID
- 2) Database connection string
- 3) Name of ODBC driver used to connect to the Oracle database.
- 4) Two digit county code representing the Central Office "county".

The Main Menu process makes many calls to the swss.bas code module file. The menu bar of this process is copied to all other processes, to maintain a sense of continuity between processes. This menu bar also relies upon the frmAboutCFC form file and its corresponding .frx file.

The visual design of this process requires the use of a few custom controls. The following table is a listing of these dependencies.

<b>Control or Function</b>	<b>File Needed (WINNT\system32)</b>
Microsoft FlexGrid Control 5.0 (SP2)	msflxgrd.OCA, msflxgrd.OCX
Sheridan 3D Frame and 3D Panel Controls	THREED32.OCA, THREED32.OCX
Microsoft ActiveX Data Objects 2.0 Library	MSADO15.DLL

#### Functional Description

**(Describe what this unit is intended to do on a direct level. This should approach pseudo-code in order to illustrate its intentions. It may also include flow-charts, data flow diagrams, business event lists, or business entity lists as appropriate.)**

The Main Menu is used to:

- 1) "shell out" to all other process executables, including the Soundex executable and the Case Listing executable,
- 2) determine login user's access rights to all process executables, based upon log number selection and list of worker\_ids that can update any case assigned to the login user,
- 3) set INI file's initial values before "shelling out" to any other process,
  - a) Gathering case information to be stored in the INI file after a case's log number has been selected.
- 4) create a "template" for the common menu bar and the code executed under each menu's Click event,
- 5) activate/deactivate Corrections Mode,
- 6) create a template grid and code for Viewing Corrections by all processes,
- 7) shell out to Case Listing if log number of desired case is not known,
- 8) shell out to Soundex to allow user to select a particular case by any criteria if the case's log number and case number are not known.

The following outline lists the Oracle SQL packages and procedures used by this process.

- 1) Main\_Menu
  - a) get\_load\_securities
  - b) get\_case\_info
  - c) get\_responsibility
  - d) get\_update\_worker\_ids
  - e) get\_secondary\_worker\_ids

Documentation for this package can be found in the file [DAT\\_MillerM\\_MainMenuPkg.doc](#) located in the network folder

[\\15\\_gt\\_fs2\apps\USERS\SHARE\SERVWORK\oracle\CommonCode](\\15_gt_fs2\apps\USERS\SHARE\SERVWORK\oracle\CommonCode). The actual code for this package can be found in the files [Main\\_Menu.sql](#) and [Main\\_Menu\\_body.sql](#) which are located in the network folder

[\\15\\_gt\\_fs2\apps\USERS\SHARE\SERVWORK\oracle\Packages](\\15_gt_fs2\apps\USERS\SHARE\SERVWORK\oracle\Packages).

The program flow for determining what level of access to grant to the currently logged in user when he/she selects a case is found in the files [Case Selection Process For Unbelievers.pdq](#) and [Supervisor Tree.pdq](#). These files are found in the network folder

[\\15\\_gt\\_fs2\apps\USERS\SHARE\SERVWORK\oracle\CommonCode](\\15_gt_fs2\apps\USERS\SHARE\SERVWORK\oracle\CommonCode).

#### Data Source

**(Describe from where in the system the data this unit requires comes. The description should include the database location, such as Cabinet, Drawer, Report and Fields, or other, external sources.)**

The data for this process is retrieved from an ORACLE database.

Database tables and columns:

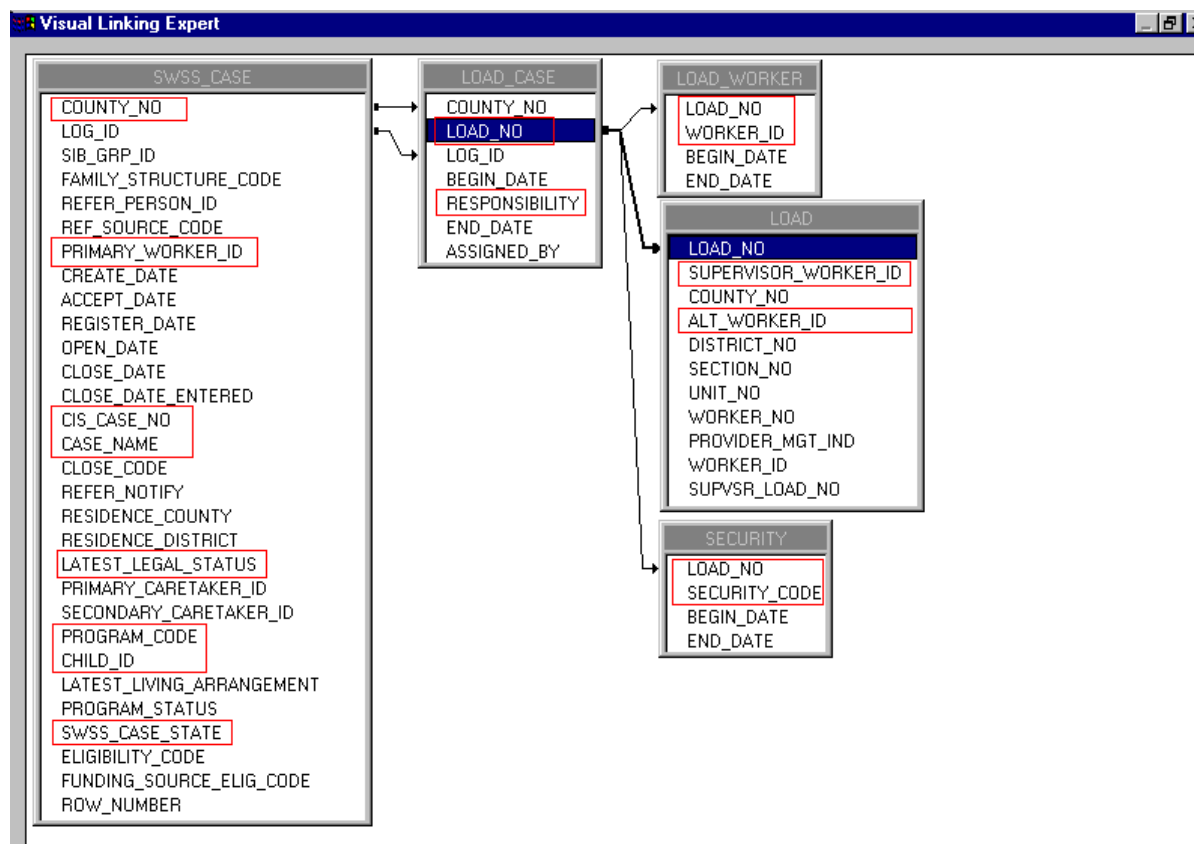
- 1) swss\_case
  - a) cis\_case\_no
  - b) case\_name
  - c) program\_code
  - d) program\_status\_code
  - e) latest\_legal\_status
  - f) county\_no
  - g) child\_id
  - h) primary\_worker\_id
  - i) log\_id
- 2) load\_case
  - a) load\_no
  - b) log\_id
  - c) county\_no
  - d) responsibility
  - e) end\_date
- 3) load
  - a) worker\_no
  - b) supervisor\_worker\_id
  - c) alt\_worker\_id
  - d) load\_no
- 4) load\_worker
  - a) load\_no
  - b) worker\_id
  - c) end\_date
- 5) security
  - a) security\_code
  - b) end\_date

#### Data Target

**(Describe to where in the system the data this unit generates will be stored.)**

This process does not store any data into the Oracle database.

## Data Relationships



Current Issues  
None.

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## 10.2 Memos

### 10.2.1 CORRECTIONS MEMO

STATE OF MICHIGAN  
**FAMILY INDEPENDENCE AGENCY**

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To: Sue London, Director  
SWSS Project

Date: September 27, 1999

From: Mary Ann Jensen, Consultant  
SWSS Policy  
Child and Family Services Administration

Subject: Main Menu Module Documentation

We have carefully reviewed the User Requirements document on the Main Menu Module and have the following clarifications:

Changes to September 15, 1999 Document:

1. Page 2, 1.1, Purpose, delete the last phrase in this section: "... ~~which holds the log number of one client.~~" This is not relevant to workers and is misleading since Main Menu does much more than just hold the log number.
2. Page 4, second bullet, delete ~~an Add New~~. Add New is not relevant to the paragraph.
3. Page 4, second bullet, third line; add "**or child data**" after Case Registration.
4. Page 9, MM-3.2.1: change to read "... the "Log #" field ~~may be~~ **will be** prefilled if the user did .... associated with the case, ~~a~~ **the** "Case #" field ~~may also~~ **will** be prefilled.
5. Page 9, MM-3.5.2: delete "... ~~so that they can create companion cases or register the case (by printing the FIA-133a) if necessary.~~" Supervisors can change any information.
6. Page 11: MM-4.2.2.2.1.1.1: add at the end of the sentence "...**in corrections mode.**"

Please let me know if you need additional information.

cc: Carol Kraklan  
Phil Rock  
Sue Doby  
Nancy Presocki



October 14, 2003

10.2.2 Addendum 1

STATE OF MICHIGAN  
**FAMILY INDEPENDENCE AGENCY**

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***MEMORANDUM***

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To: Sue London, Director  
SWSS Project

Date: October 13, 1999

From: Mary Ann Jensen, Consultant  
SWSS Policy  
Child and Family Services Administration

Subject: Main Menu Module Documentation – Addendum 1

It is necessary to amend the Main Menu Module Documentation Memo of September 27, 1999. After further discussion, it was noted that the following change is needed:

In the Main Menu User Requirements document, add the following requirement:

MM-4.6 Users who have been assigned to the “clerical” security level must be given full update access to all cases (except “high profile” cases) in their unit<sup>10</sup> that are assigned to any program(s) to which the user’s profile has been granted access.  
These users may view the Case Summary on the “high profile” cases.

cc: Sue Doby  
Phil Rock  
Nancy Presocki  
Carol Kraklan

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<sup>10</sup> “All cases in their unit” refers to all cases that have primary load numbers assigned to them that have the same county, district, section, and unit combination found in the clerical user’s load number.

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STATE OF MICHIGAN  
**FAMILY INDEPENDENCE AGENCY**

*mat*  
Z

MEMORANDUM

**To:** Nancy Presocki, Manager  
SWSS Development Team

**Date:** September 10, 1999

**From:** Mary Ann Jensen, Consultant  
SWSS Policy

**Subject:** Changes to Main Menu

As a result of the SWSS lockdown and subsequent discussions, the following revisions are requested to the Main Menu screen.

1. The name of the Medical icon should be changed to **Medical Passport** and the icon should be disabled as it will not be a part of the first SWSS release. It should be left on the screen as it will be enabled in a future phase.
2. The Case Closing icon should be moved to the top panel of the screen under the Education icon.
3. The Adoption Activity icon should be eliminated. See August 27, 1999 memo on Adoption Activity Screen.
4. Ticklers should be moved from Utilities and have its own icon in the middle panel of the Main Menu screen.

Thank you for your attention and cooperation.

cc: Sue London  
Sue Doby  
Phil Rock  
Sue Tomes  
Carol Kraklan

"We Strengthen Individuals and Families Through Mutual Respect and Mutual Responsibility."

October 14, 2003

STATE OF MICHIGAN  
**FAMILY INDEPENDENCE AGENCY**

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MEMORANDUM

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**To:** Nancy Presocki, Manager  
ITMS, SWSS Development Team

**Date:** August 31, 1999

**From:** Mary Ann Jensen, <sup>max</sup>Consultant  
SWSS Policy  
Child and Family Services Administration

**Subject:** Corrections

It has been noted that if you are in the Corrections Mode and move to another case, you are still in the Corrections Mode. This can cause confusion and frustration in the field. Thus, we are requesting that the Corrections mode be automatically "turned off" when a user accesses another case.

In addition, if the user remains in the same case but tries to access a module which does not have correction capability, the user should not be permitted access to that module. The user should receive a message advising that "access to this module is not permitted while in corrections mode".

Thank you for your assistance.

Please let me know if you need additional information.

cc: Sue London  
Carol Kraklan  
Phil Rock  
Sue Doby  
Sue Tomes

*Electronizetokit/MainMenu/Corrections memo*

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### 10.2.3 Email

**From:** Paula PALMATIER  
**To:** MillerM7  
**Date:** July 15, 1999 (Thursday) 7:08am  
**Subject:** Main Menu -Creative Solution -Reply

Ok. That's creative. You will need to put that one on the log, because probably not too many people have the cursor over there. Maybe you could do the same thing with the Log #?

>>> Matthew Miller 07/14/99 10:06am >>>

I was creative and added a tool tip to the Case Number field so that it displays the Case Name of the selected case. HA!

>>> Paula PALMATIER 07/14/1999 07:12am >>>

After the worker enters the log # on the Main Menu, would there be room to have the Case Name display in the top corner box? Just a thought from Melissa.

**From:** Paula PALMATIER  
**To:** matt  
**Date:** October 7, 1998 (Wednesday) 10:16am  
**Subject:** Main Menu

Soundex - Find a client puts the log number in the ini file. Could Main Menu recognize that it was called from

"Source Process=Soundex and Miscellaneous=Find a client " and then get the rest of the case information (like I think it does for Case Listing) and put it in the ini file?

**From:** Steve REDMAN  
**To:** MillerM7  
**Date:** February 13, 1999 (Saturday) 4:24pm  
**Subject:** OTI

Policy Staff has requested that funding determinations not be allowed for OTI cases. Legal Status 47, 48, 49. You are the point of control for main menu and autoflow. Are you agreeable?

Let's discuss this. I also want to check with Mary Anne Jensen again and make certain she's considered all angles.

Thanks.

**From:** Mickey Hadick  
**To:** matt  
**Date:** September 7, 1999 (Tuesday) 9:30am  
**Subject:** Main Menu requirements from the system flow and X3 documents

Here are a couple of simple, obvious requirements, but requirements nonetheless.

#### CR-3.8 MAIN MENU REQUIREMENTS:

CR-3.8.1 For Registered Cases, the Worker should be allowed to enter any information that they have on SWSS at anytime before the Case is Open (by printing the FIA-5S).

CR-3.8.2 A worker's supervisor requires access to the worker's caseload so that they can create companion cases or register the case (by printing the FIA-133) if necessary.

**From:** Matthew Miller  
**To:** PALMATIERP

October 14, 2003

**Date:** November 2, 1998 (Monday) 9:31am  
**Subject:** Main Menu update

Hi Paula!

I need to make a fix to both the VB and the SQL code for the Main Menu process. Apparently one single load number **CAN** be both the primary and the secondary load number for a single case. It has to do with the case's transition from Foster Care to Adoption. If a worker's load number is assigned to the CFC and the ADPT programs, that worker can become both the primary and the secondary worker when a case goes from CFC to ADPT.

Therefore, I must change both my SQL code and my VB code to handle this contingency. I shall get started on it immediately and I will let you know when it is done. If you can, please do not release a new MainMenu executable until it is synchronized with what is in the database.

Thanks,

Matt

**From:** Mary Ann Jensen  
**To:** DSS.BUIS.PALMATIERP, KRAKLANC2  
**Date:** June 1, 1999 (Tuesday) 11:23am  
**Subject:** log #2822 -Reply -Reply

The supervisor of the secondary worker should have the same update capabilities as the secondary worker. (This Email should be considered an addendum to the 5/24/99 System Security memo.)

Please let me know if we need further discussion.

>>> Carol Kraklan 05/28/99 10:40am >>>

Mary Ann, this is a problem for assigning an adoption worker. The adoption sup. does the assignment and the message about printing a 5S to update CIS with the secondary worker information displays after the adoption sup. assigns the case, but they can not print a 5S.

What should we do?

>>> Paula PALMATIER 05/28/99 10:27am >>>

This was the one where you signed on as lonsberrymsup and tried to print the 5S. lonsberrymsup is the supervisor to the secondary worker (adopt worker). Security program does not give Update capabilities to the sup of the secondary worker.

**CC:** DSS.BUIS.PRESOCKIN

**From:** Carol Kraklan  
**To:** DSS.BUIS.MillerM7  
**Date:** May 4, 1999 (Tuesday) 2:19pm  
**Subject:** Log #1762-Message

Steve Redman informed me that you needed an e-mail to clarify the message to prevent a worker from accessing funding for certain legal statuses. The message should read:

"The selected case is a Juvenile Justice case with a legal status of either:

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47-OTI-Delinquent, or  
50-Non-ward-Delinquent petition filed;

Funding Determination can not be accessed due to legal status."

This would also be true for legal status 48-OTI-neglect, and the program would be Foster Care. Funding Determination is never valid for any adoption case, legal status 43 or 49.

Please let me know if you have any questions.

**CC:** JENSENM2, DSS.BUIS.PRESOCKIN  
**From:** Matthew Miller  
**To:** PALMATIERP  
**Date:** September 2, 1998 (Wednesday) 5:27pm  
**Subject:** Latest Main Menu

I have now made the two corrections to the Main Menu that you and Shankar requested. If the Case Registration process is selected without a log number from the Main Menu, the user is now given a choice of either aborting the request or shelling out to Case Listing. Also, when Comments is shelled from the Main Menu, the Miscellaneous entry in the SWSS\_INI.ini file is set to MainMenu.exe (it used to get cleared).

I have some more security related stuff to work on for the Utilities process, but, the current version seems to be in a much more stable state (I hope).

**From:** Matthew Miller  
**To:** CORKWELLB  
**Date:** August 18, 1998 (Tuesday) 10:38am  
**Subject:** Main Menu -Reply

It has now been done. I switched the order of the icons, switched the order in the Screens menu, and re-assigned the submenu shortcut keys. The new shortcut keys for the Legal and Funding Determination submenus of the Screens menu are now Ctrl + F3 and Ctrl + F4, respectively.

The changes have been made to the Common Menu Bar and are now in Visual SourceSafe. The adjustments have also been made to the MainMenu project and are also now in Visual SourceSafe. I have also updated these changes with what is on the p: drive, including copying the new compiled MainMenu executable to the Alpha001 directory.

Whew! I think that covers it all. I would suggest that if you only need to change the order of these two processes in your project form Screen sub menus, just use the menu editor to switch their order and their shortcut key assignments. Of course, if none of your Screens sub menus have shortcut keys assigned to them, go ahead and get the common menu bar from Visual SourceSafe.

Don't hesitate to mention any other needed MainMenu/Common Menu Bar enhancements that are needed.

Matt

>>> Bonnie CORKWELL 08/18/1998 09:53am >>>

Please put the Legal icon before the Funding Determination icon. Prashant and I met with Carol and MaryAnn this morning; after much discussion, it was decided that the worker should enter legal information before doing the funding determination.

October 14, 2003

**From:** Prashant BENDRE  
**To:** MillerM7  
**Date:** October 14, 1998 (Wednesday) 3:02pm  
**Subject:** Funding on JJ Cases

Funding can be done on all registered or open FC cases as of now.  
It was pointed out to me that we should also allow funding on JJ cases with following legal status -  
40, 46, 52  
Do NOT allow funding on JJ cases with legal status of 47 or 50. I believe these are all legal status that cover JJ cases. Bonnie , please correct me if I am wrong :-)  
Hope this should be an easy edit to implement.  
Thanks,  
Prashant

**CC:** PALMATIERP, CORKWELLB  
**From:** Paula PALMATIER  
**To:** matt  
**Date:** June 30, 1998 (Tuesday) 2:33pm  
**Subject:** Main Menu

To enter Corrections on a non-closed case, a worker must have update capability, else do not allow them in. When a user tries to enter Corrections Mode and the case is closed, they must be a supervisor with Update capability.

Thanks  
Paula

**From:** Bonnie CORKWELL  
**To:** team418  
**Date:** March 5, 1999 (Friday) 8:31am  
**Subject:** coming attractions to the swss\_case\_state near you

Here's the new values that I've requested database put in; any questions or problems with this please come see me.

475 - Registered Referral (registered case referred to adoption)  
450 - Active Referral (active case referred to adoption)  
400 - Unregistered  
375 - Registered Accepted (registered case accepted by adoption)  
350 - Active Accepted (active case accepted by adoption)  
300 - Register  
275 - Registered Assigned (registered case assigned by adoption)  
250 - Active Assigned (active case assigned by adoption)  
200 - Active

All of this is necessary due to the fact that a REGISTERED CFC case can now be referred to adoption unit; before this the case had to be active before the adoption process could start. We need to define the fact that the CFC case was in a registered or active state and then what status the adoption process is in (referred, accepted, assigned). This way if the adoption disrupts or the judges denies the termination petition I know what state the CFC case needs to be (registered or active).

**From:** Carol Kraklan

October 14, 2003

**To:** DSS.BUIS.CORKWELLB  
**Date:** May 7, 1999 (Friday) 3:40pm  
**Subject:** clarification on secondary workers - adoption ones in particular -Reply

Secondary Adoption workers have access to:

Legal  
MARE  
Adoption Activity  
Case Summary

A plain ol' secondary worker has view only access to the case.

>>> Bonnie CORKWELL 05/07/99 03:25pm >>>

Matt had a question about what a secondary adoption worker can do. When you have a minute, could you write up something that spells out which screens the secondary worker, and note where there is differences between plain old secondary and adoption secondary, should have update access to? I think I'm set in legal and placement but I couldn't answer Matt's question for the other screens. Thanks.

**CC:** JENSENM2  
**From:** Matthew Miller  
**To:** HADICKM3  
**Date:** September 1, 1998 (Tuesday) 8:46am  
**Subject:** "Edit" from main menu -Reply

Changed SWSS.BAS code so that if Main Menu shells out to Case Registration and a valid log\_id has been selected, the Miscellaneous entry of the SWSS\_INI.ini file gets set to "Edit".

This change has now been reflected into the newest version of the Main Menu executable found in the magic Alpha001 folder on the p: drive. Since this also was a code addition to the SWSS.BAS file, you might want to get the latest version of it for your project as well.

Also, I tried running the Case Registration process on my d: drive, however, I keep getting an Error 91 ("Object variable or With Block variable not set". Does this error have to do with making sure that "Edit" is placed into the Miscellaneous section of the INI file? When I test it on my machine, it doesn't seem to help. Does the Main Menu need to do something else when it shells out to Case Registration?

Thanks

>>> Mickey Hadick 08/31/1998 03:10pm >>>  
Almost forgot....

When the CaseReg icon is 'selected' from main menu, and when there is a valid (registered or unregistered) log number entered, then fire off CaseReg.exe, and put: "Edit" in the miscellaneous entry of SWSS\_INI.ini.

I think that's all I need. --Mick

**From:** Paula PALMATIER  
**To:** matt  
**Date:** July 7, 1998 (Tuesday) 9:37am



October 14, 2003

**Subject:** Main Menu

Workers are only supposed to be able to get to the case registration screen when a case is unregistered. Is the Main Menu checking for this before it let's the worker "pass" into other screens?

**From:** Bonnie CORKWELL  
**To:** Matt  
**Date:** January 27, 1999 (Wednesday) 8:34am  
**Subject:** autoflow

Would you change the autoflow process to bypass payment if the case is in a registered state? They can only do payments on active cases. Thanks.

**From:** Bonnie CORKWELL  
**To:** Matt  
**Date:** March 25, 1999 (Thursday) 12:52pm  
**Subject:** autoflow

If possible, when the legal status is 50, could funding be bypassed if in autoflow?

**From:** Bonnie CORKWELL  
**To:** Matt  
**Date:** February 22, 1999 (Monday) 8:17am  
**Subject:** Adoption & AutoFlow -Reply -Forwarded

Bypass funding in autoflow if adoption case but they will need to be able to access it from the main menu.

**From:** Melissa Lonsberry  
**To:** DSS.BUIS(CORKWELLB)  
**Date:** February 22, 1999 (Monday) 7:58am  
**Subject:** Adoption & AutoFlow -Reply

OTI's would be funded by the other (sending state) so you can bypass them. I spoke with Bill Dodge and he said that the adoption worker needs to be able to reference and print fundings (display only) that were done while the child was in foster care for other purposes, but would not be doing a funding determination while living arrangement is 04 - adoption, legal status 43.

>>> Bonnie CORKWELL 02/20/99 11:17am >>>

Should Matt program autoflow to bypass funding for all adoption cases? The legal error log specifies LS of 43 only but he asked about the others (such as OTI Adoption). Thanks.

**CC:** CarolK, Henry  
**From:** Mickey Hadick  
**To:** matt  
**Date:** March 10, 1999 (Wednesday) 4:51pm  
**Subject:** Access to Case Registration Screen

Kraklan has pointed out that access to Case Registration needs to be cut off once the case is ACTIVE, CLOSED or WITHDRAWN. This will straighten out some confusion on the tester's part any way. At your convenience, thanking you, I remain, --Mick

**From:** Bonnie CORKWELL  
**To:** DSS.BUIS(PRESOCKIN), HADICKM3  
**Date:** March 16, 1999 (Tuesday) 9:17am

October 14, 2003

**Subject:** ACCESS to CASE REGISTRATION based on SWSS CASE STATES -Reply

A case is in the registered state when the case status is 300, 475, 375, and 275. It is in the active state when the case status is 200, 450, 350, and 250.

**CC:** DSS.BUIS(MillerM7),

**From:** Mickey Hadick

**To:** nancy p

**Date:** March 16, 1999 (Tuesday) 9:12am

**Subject:** ACCESS to CASE REGISTRATION based on SWSS CASE STATES

Carol had logged as an error the fact that ACTIVE cases could still get to the Case Registration screen. She stated that once a case "is open" (becomes ACTIVE) access to case registration should be cut off. Because we've just changed and added swss case states regarding adoption, we'd like policy clarification on access to case reg for the new states.

400	Unregistered	
300	Registered	
375	Registered Accepted	(new)
275	Registered Assigned	(new)
475	Registered Referral	(new)

**CC:** matt, bonnie

**From:** Paula PALMATIER

**To:** Matt

**Date:** July 20, 1998 (Monday) 2:00pm

**Subject:** Main Menu

Did I tell you that Mickey said spell out "Five Day Packet" ?

Thanks  
Paula

10.2.4 Addendum 3

STATE OF MICHIGAN  
**FAMILY INDEPENDENCE AGENCY**

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MEMORANDUM

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**To:** Sue London, Director  
SWSS Project

**Date:** June 27, 2000

**From:** Mary Ann Jensen, Consultant  
SWSS Policy  
Child and Family Services Administration

**Subject:** Main Menu Module Documentation - Addendum 3

It is necessary to amend the Main Menu Module Documentation Memos of September 27, 1999, October 13, 1999 and November 12, 1999. During unit testing, it was determined that Main Menu is not permitting the user access to view or correct a closed adoption case. Thus, the following revisions are needed:

1. MM-4.2.2 must be modified to state “.... with access to foster care, **adoption or and** juvenile ....non-High Profile Foster Care, **Adoption** or Juvenile ....”
2. MM-4.2.5 must be modified to state “.... update a clsoed Foster Care, **Adoption** or Juvenile ....”
3. MM-4.3.1 must be modified to state “.... or closed Foster Care, **Adoption** or Juvenile ....”

Please let me know if you need additional information.

cc: Carol Kraklan  
Phil Rock  
Sue Doby  
Nancy Presocki

10.2.5 Addendum 4

STATE OF MICHIGAN  
**FAMILY INDEPENDENCE AGENCY**

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MEMORANDUM

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**To:** Sue London, Director  
SWSS Project

**Date:** November 14, 2000

**From:** Mary Ann Jensen, Consultant  
SWSS Policy  
Child and Family Services Administration

**Subject:** Main Menu Module Documentation - Addendum 4

It is necessary to amend the Main Menu Module Documentation Memos of September 27, 1999, October 13, 1999, November 12, 1999 and June 27, 2000. During focussed testing (SER #'s 1207 and 2059), it was determined that the following revisions are needed:

4. MM-4.3.2 must be modified to state “.... ~~or secondary~~.....”
5. Add a sub-requirement to MM-4.3.2 If the user is a secondary worker, s/he can restrictively use corrections mode on any active case assigned to them as a secondary worker. Add footnote #8 to the ‘restrictively’ reference.
6. Add a new sub-requirement to MM-4.3.2 The primary worker and his/her supervision is to be permitted to correct a funding determination on a registered case.

Please let me know if you need additional information.

cc: Carol Kraklan  
Sue Doby  
Beth Dean

10.2.6 Addendum 5

STATE OF MICHIGAN  
**FAMILY INDEPENDENCE AGENCY**

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MEMORANDUM

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**To:** Sue London, Director  
SWSS Project

**Date:** December 5, 2000

**From:** Mary Ann Jensen, Consultant  
SWSS Policy  
Child and Family Services Administration

**Subject:** Main Menu Module Documentation - Addendum 5

It is necessary to amend the Main Menu Module Documentation Memos of September 27, 1999, October 13, 1999, November 12, 1999, June 27, 2000 and November 14, 2000. During focussed testing (SER # 1559), it was determined that the following revision is needed:

1. Add a sub-requirement to MM-4.3 The Program Office or P/DC must be allowed access to the correction process to correct (i.e., undo) a previous Program Office or P/DC action.

Please let me know if you need additional information.

cc: Carol Kraklan  
Sue Doby  
Beth Dean

## 11 TEST PLANS

### 11.1.1 Test Plan Created by Policy

Says it's on page 62, however only 1-38 are electronically available on the shared drive.

### 11.1.2 Test Plan Created by SWSS Development

## Test Plan – SWSS Main Menu

Matthew D. Miller

### Process Accessibility

- All workers are allowed access to the Main Menu process.

### Case Functionality

- Most process selections from the Main Menu require that a case be selected before attempting to access the process. If the worker attempts to access one of these process without selecting a case, a message should appear allowing the choice of either executing Case Listing to select a case or canceling the process activation request. The only processes which do not require a case are:
  - Case Listing
  - Find a Client
  - Add New
  - Ticklers
  - Utilities (special note: The Reconciliation process is accessible through Utilities and **does** require a case. Therefore, if the worker wishes to successfully get to Reconciliation through Utilities, they need to specify a case from Main Menu or Case Listing first)
- A case can be selected by either entering a log number in the “Log #” field, by selecting a case from the Case Listing process, or by selecting a case from the Find a Client (or Soundex) process. When the Case Listing or Find a Client process returns to the Main Menu, the log number selected in that process should appear in the Log # field of the Main Menu. Selecting a case by specifying only a Case number is currently not supported (this functionality should be accomplished in the Find a Client process).
- The Main Menu process should only have to gather case information from the Oracle database if:
  - Main Menu is activated from the Case Listing, Find A Client, or Case Registration processes

- The log number has been changed in the Log # field (except if that field has been cleared) and the worker has not requested the activation of the Case Listing, Find a Client, or Add New processes
- If a log number is entered which does not exist in the system, a message should be displayed saying so.
- Two processes on the Main Menu require that the selected case be an Adoption case before they may be activated. These processes are Adoption Activity and M.A.R.E. Registration. If the selected case is not an adoption case and one of these two processes is selected, a message should pop up informing the worker that only adoption cases may be modified through this process.
- The Funding Determination process requires that the selected case is a Foster Care case or an assigned Adoption case without an adoption placement before it can be activated. If the selected case does not fit these criteria, a message box should pop up explaining what the problem is.
- A case's program type should be verifiable by activating the Case Summary process.
- After the worker selects a case and selects a process, the case information should then be stored into the SWSS\_INI.INI file. This information includes the worker's security level with respect to the case, the worker's responsibility to the case (if any), and a list of workers who are allowed to update the selected case.
- A worker's "SWSS session" should be terminated by exiting from the Main Menu process by selecting either the Exit icon or by selecting the Exit submenu in the File menu of the menu bar. Upon this session termination, all section of the SWSS\_INI.INI file should be cleared except for the [Other] section.

## Case Update Determination

- If the case is an Adoption case
  - And if the worker is the primary worker assigned to this case or is in the list of update capable worker for the selected case (the update capable list consists of the alternate worker assigned to the primary worker of the case, the supervisor assigned to the primary worker of the case, the alternate worker assigned to the supervisor of the primary worker of the case, that supervisor's supervisor, etc)
  - And if the case is closed
    - The worker should have view-only privileges on the case information.
  - And if the case not closed but is active
    - The worker should have full update privileges on the case information.

- And if the worker is not the primary worker assigned to this case and is not in the list of update capable worker for the selected case, but is a secondary worker assigned to the selected case
  - And if the case is closed
    - The worker should have view-only privileges on the case information.
  - And if the case is not closed but is active
    - The worker should have restricted update privileges on the case information. Whichever process the worker activates will determine what those update restrictions are for the selected case information.
- And if the worker is not the primary worker, an update capable worker, or a secondary worker to the case
  - And if the case is closed
    - The worker should be denied access to the case information. This should be told to the worker with a message box.
  - And if the case is not closed but is active
    - And if the worker has been assigned to the Adoption program
      - The worker should have view-only privileges on the case information.
    - And if the worker has not been assigned to the Adoption program
      - The worker should be denied access to the case information. This should be told to the worker with a message box.
- Else if the case is not an Adoption case but is a Foster Care, Protective Services, Juvenile Justice, or Referral case
  - And if the case is active
    - And if the worker is the primary worker assigned to this case or is in the list of update capable worker for the selected case (the update capable list consists of the alternate worker assigned to the primary worker of the case, the supervisor assigned to the primary worker of the case, the alternate worker assigned to the supervisor of the primary worker of the case, that supervisor's supervisor, etc)
      - The worker should have full update privileges on the case information.
    - And if the worker is not the primary worker assigned to this case and is not in the list of update capable worker for the selected case, but is a secondary worker assigned to the selected case
      - The worker should have restricted update privileges on the case information. Whichever process the worker activates will determine what those update restrictions are for the selected case information.
    - And if the worker is not the primary worker, an update capable worker, or a secondary worker to the case



- And if the worker has been assigned to the same program that the case belongs to
  - The worker should have view-only privileges on the case information.
- And if the worker has not been assigned to the program that the case belongs to
  - The worker should be denied access to the case information.  
This should be told to the worker with a message box.
- And if the case is not active but is closed
  - And if the worker has been assigned the supervisor security level or higher (00 – 30)
    - And if the worker is in the list of update capable workers for the selected case (the update capable list consists of the alternate worker assigned to the primary worker of the case, the supervisor assigned to the primary worker of the case, the alternate worker assigned to the supervisor of the primary worker of the case, that supervisor's supervisor, etc)
      - The worker should have full update privileges on the case information.
    - And if the worker is not the primary worker assigned to this case and is not in the list of update capable worker for the selected case, but is a secondary worker assigned to the selected case
      - The worker should have restricted update privileges on the case information. Whichever process the worker activates will determine what those update restrictions are for the selected case information.
    - And if the worker is not an update capable worker or a secondary worker for the selected case
      - The worker should be denied access to the case information.  
This should be told to the worker with a message box.
  - And if the worker has been assigned the worker security level (31 – 60)
    - And if the worker has been assigned to the same program that the case belongs to
      - The worker should have view-only privileges on the case information.
    - And if the worker has not been assigned to the program that the case belongs to
      - The worker should be denied access to the case information.  
This should be told to the worker with a message box.
  - And if the worker has been assigned to a security level below the worker level (61 - 99)
    - The worker should have restricted update privileges on the case information. Whichever process the worker activates will

determine what those update restrictions are for the selected case information.

## Corrections Mode

- If the worker is only allowed view-only privileges on the selected case information
  - The Corrections menu should be disabled and the user should not be allowed to make changes to corrections fields for the case. A message box should also pop up to inform the worker of this.
- Else if the worker is allowed restricted or full update privileges on the case information
  - And if the case is not closed
    - The worker should be able to enter Corrections information for the selected case.
  - And if the case is closed and the worker has been assigned a Supervisor or better security level (00 – 30)
    - The worker should be able to enter Corrections information for the selected case.
  - And if the case is closed but the worker's security level is less than Supervisor level (31 – 99)
    - The Corrections menu should be disabled and the user should not be allowed to make changes to corrections fields for the case. A message box should also pop up to inform the worker of this.

Case Status and Case State

The Main Menu

### Case Program and Status outline

- 1) The case is a CFC, CPS, JJ, or Referral case
  - a) The Case Status is Active
    - i) Go to **Check Supervisor Tree** outline.
  - b) The Case Status is Closed
    - i) Go to **Check Security Level** outline.
  - c) The Case Status is neither Active or Closed.
    - i) Display a message stating that the Status code assigned to the selected case is undefined.
- 2) The case is an ADPT case
  - a) The Case Status is either Active or Closed
    - i) Go to **Check Supervisor Tree** outline.
  - b) The Case Status is neither Active or Closed
    - i) Display a message stating that the Status code assigned to the selected case is undefined.
- 3) The case does not belong to either CPS, CFC, ADPT, JJ, or Referral
  - a) Display a message stating that security issues have not yet been defined for the selected Case Program.

### Check Supervisor Tree outline.

- 1) The current worker is either the Primary Worker assigned to the case or is a worker who has update permissions on the selected case according to the rules of the Supervisor Tree. This may mean that the current worker is the Primary Worker, the Alternate Worker assigned to the Primary Worker, the Primary Worker's supervisor, the Alternate Worker assigned to the Primary Worker's supervisor, the supervisor of the Primary Worker's supervisor, the Alternate worker assigned to the supervisor of the Primary Worker's supervisor, etc.
  - a) The selected case is an Adoption case and the Case Status is Closed.
    - i) Set the SWSS\_INI.INI Update Mode entry to *Not Updateable*.
  - b) The selected case is either not an Adoption case and/or the Case Status is not Closed.
    - i) Set the SWSS\_INI.INI Update Mode entry to *Updateable*.
- 2) The current worker is a Secondary Worker assigned to the selected case.
  - a) The selected case is an Adoption case and the Case Status is Closed.
    - i) Set the SWSS\_INI.INI Update Mode entry to *Not Updateable*.
  - b) The selected case is either not an Adoption case and/or the Case Status is not Closed.
    - i) Set the SWSS\_INI.INI Update Mode entry to *Selectively Updateable*. This means that the shelled executable may have to decide how much access the current worker has to case information.
- 3) The current worker does not fall within the Supervisor Tree for determining access to the selected case, nor is the current worker the Secondary Worker assigned to the case.
  - a) The selected case is an Adoption case and the Case Status is Closed.
    - i) Display message stating that access to the selected executable is denied and explain why.
  - b) The selected case is either not an Adoption case and/or the Case Status is not Closed.
    - i) Go to **Check Program Code List** outline.

**Check Security Level** outline

- 1) The current worker's security level is Supervisor or better (a security code value ranging from 00 – 30)
  - a) Go to **Check Supervisor Tree** outline.
- 2) The current worker's security level is Worker (a security code value ranging from 31 – 60).
  - a) Go to **Check Program Code List** outline
- 3) The current worker's security level is below Worker level (a security code value ranging from 61 – 99)
  - a) Set the SWSS\_INI.INI Update Mode entry to *Selectively Updateable*. This means that the shelled executable may have to decide how much access the current worker has to case information.

**Check Program Code List** outline

- 1) The selected case belongs to a program which the current worker has been assigned to.
  - a) Set the SWSS\_INI.INI Update Mode entry to *Not Updateable*
- 2) The selected case belongs to a program which the current has *not* been assigned to.
  - a) Deny access to the selected process and display a message stating so and why.

Shelling from one application to another

**Corrections Mode** outline

- 1) The Update Mode entry in the SWSS\_INI.INI file does not equal *Not Updateable* and a security level has been determined for the current worker on the selected case.
  - a) The Case Status is Closed and the current worker is a Supervisor (security code value is <= 30).
    - i) The current worker may use the Corrections menu.

- b) The Case Status is Closed and the current worker is not a Supervisor (security code value is > 30).
  - i) Corrections Mode is deactivated and the Corrections menu is disabled.
- c) The Case Status is not Closed.
  - i) The Case State is Registered.
    - (1) Corrections Mode is deactivated and the Corrections menu is disabled.
- 2) The Update Mode entry in the SWSS\_INI.INI file is set to *Not Updateable* or a security level for the current worker on the current case has not been selected.
  - a) Corrections Mode is deactivated and the Corrections menu is disabled.

**Determine Permission To Shell** outline

- 1) The current worker is shelling to the Report Generation, Data Reply, 5 Day Packet, Case Closing, Case Listing, Medicaid, Medical, Payment, Placement, Print 133, Print 5S, Providers, Education, Case Summary, Ticklers, Utilities, Main Menu, or the Victim Letter process.
  - a) Access to the selected process is granted up to this point.
  - b) Go to **Special Shelling Determination** outline.
- 2) The current worker is shelling to the Adoption Activity or the M.A.R.E. Registration process.
  - a) The selected case is an Adoption case and the current worker has permission to use the selected process.
    - i) Access to the selected process is granted up to this point.
    - ii) Go to **Special Shelling Determination** outline.
  - b) The selected case is not an Adoption case.
    - i) Access to the selected process is denied. A message stating this is displayed.
- 3) The current worker is shelling to the Case Registration process.
  - a) A log number has been entered into the log number field and the currently running process is the Main Menu process.
    - i) The value of the Miscellaneous entry in the SWSS\_INI.INI file is set to "Edit"
  - b) Access is to the Case Registration process granted up to this point.
  - c) Go to **Special Shelling Determination** outline.
- 4) The current worker is shelling to the Comments process.
  - a) The worker has activated the Comments process from the Common Menu Bar.
    - i) The value of the Miscellaneous entry in the SWSS\_INI.INI file is cleared.
  - b) Go to **Special Shelling Determination** outline.
- 5) The current worker is shelling to the Funding Determination process.
  - a) The selected case is a Foster Care case and the user has permission to shell to this process up to this point.
    - i) Access to Funding Determination is granted up to this point.
    - ii) Go to **Special Shelling Determination** outline.
  - b) The selected case is an Adoption case, the Case State is either "Referred" or "Accepted", and the user has permission to shell to this process up to this point.
    - i) Access to Funding Determination is granted up to this point.
    - ii) Go to **Special Shelling Determination** outline..
  - c) The selected case is a Juvenile Justice case, the latest legal status is either "Court Ward-Delinquent", "St Ward-DEL-ACT 150", or "Dual Wardship" (40, 46, or 52 respectively), and the user has permission to shell to this process up to this point.
    - i) Access to Funding Determination is granted up to this point.
    - ii) Go to **Special Shelling Determination** outline.
  - d) The selected case is an Adoption case, the Case State is "Assigned", and a Latest Living Arrangement has been determined.
    - i) The Latest Living Arrangement is "Adoptive Home" (code = 04).
      - (1) Access to Funding Determination is denied.
    - ii) The Latest Living Arrangement is not "Adoptive Home" (code = 04).
      - (1) Access to Funding Determination is granted up to this point.

- (2) Go to **Special Shelling Determination** outline.
- e) The current circumstances do not fall under 5a, 5b, 5c, or 5d of this section of this outline.
  - i) Access to Funding Determination is denied.
- 6) The current worker is shelling to either the Member Information or Child Information processes.
  - a) If permission for shelling to the selected process has been granted up to this point, then access to the selected process is granted up to this point.
  - b) Go to **Special Shelling Determination** outline.
- 7) The current worker is shelling to the Legal process.
  - a) The selected case is either a Foster Care, Adoption, or Juvenile Justice case.
    - i) Access to Legal is granted up to this point.
    - ii) Go to **Special Shelling Determination** outline.
  - b) The selected case is not a Foster Care, Adoption, or Juvenile Justice case.
    - i) Access to Legal is denied.
- 8) The current worker is shelling to the Retrieve Five Day Packet process.
  - a) The selected case is either a Foster Care, Juvenile Justice, or Adoption case.
    - i) The Case State is either “Registered” or “Unregistered”
      - (1) Access to the Retrieve Five Day Packet process is granted up to this point.
      - (2) Go to **Special Shelling Determination** outline.
    - ii) The Case State is not “Registered” or “Unregistered”
      - (1) Access to the Retrieve Five Day Packet process is denied.
  - b) The selected case is not a Foster Care, Adoption, or Juvenile Justice case.
    - i) Access to the Retrieve Five Day Packet process is denied.
- 9) The current circumstances of the current SWSS session do not fit in any of the cases presented in 1-8 of this outline.
  - a) Go to **Special Shelling Determination** outline.

**Special Shelling Determination** outline.

- 1) The selected case is an Adoption case.
  - a) The Case State is “Referred”
    - i) The current worker is shelling to the Adoption Activity or the M.A.R.E. Registration process.
      - (1) Access to the selected process is denied.
    - ii) The current worker is not shelling to the Adoption Activity or the M.A.R.E. Registration process.
      - (1) Access to the selected process is granted.
  - b) The Case State is not “Referred”
    - i) Access to the selected process is granted.
- 2) The selected case is not an Adoption Case.
  - a) The Case State is “Unregistered”
    - i) The current worker is shelling to the Case Listing, Case Summary, Soundex, Utilities, Main Menu, Ticklers, Case Registration, or Print 133 processes.
      - (1) Access to the selected process is granted.
    - ii) The current worker is shelling to a process not listed in (2ai) of this outline.
      - (1) Access to the selected process is denied.
  - b) The Case State is not “Unregistered”
    - i) Access to the selected process is granted.

## **12 OUTSTANDING ISSUES**

12.1 The following items require a decision or some direction from Policy staff:

1

## **Attachment A: List of SWSS Module Prefixes**